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ABSTRACT

This document, which is intended as a guide for work force preparation program providers, details the Illinois occupational skill standards for programs preparing students for employment in occupations in the court reporter/captioner cluster. The document begins with a brief overview of the Illinois perspective on occupational skill standards and credentialing, the process used to develop the skill standards, and assumptions underlying the standards. Presented next are skill standards for 10 tasks typically performed by court reporters and captioners. Each skill standard statement contains the following components: (1) the actual skill standard (including the conditions of performance, work to be performed, and performance criteria); (2) performance elements and assessment criteria; and (3) a recommended assessment and credentialing approach. The following are among the tasks for which skill standards are provided: take/write verbatim record in machine shorthand; perform captioning services; transcribe and edit transcripts; maintain appointment calendars; store and retrieve records; perform or schedule routine maintenance; and maintain accounts. The following

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items are appended: glossary; lists of Illinois Occupational Skill Standards and Credentialing Council, Business and Administrative/Information Services Subcouncil, and Court Reporter/Captioner Skill Standards Development Committee members; Business and Administrative/Information Services Subcouncil Court Reporter/Captioner skill standards recognition proposal; and list of necessary workplace skills. (MN)

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ED 448 352

ILLINOIS

OCCUPATIONAL SKILL STANDARDS

COURT REPORTER/ CAPTIONER

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COURT REPORTER/CAPTIONER

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ILLINOIS OCCUPATIONAL SKILL STANDARDS

COURT REPORTER/CAPTIONER

Endorsed for Illinois
by the
Illinois Occupational Skill Standards and
Credentialing Council

MESSAGE TO ILLINOIS CITIZENS

Dear Citizens of Illinois:

Preparing youth and adults to enter the workforce and to be able to contribute to society throughout their lives is critical to the economy of Illinois. Public and private interest in establishing national and state systems of industry-driven skill standards and credentials is growing in the United States, especially for occupations that require less than a four-year college degree. This interest stems from the understanding that the United States will increasingly compete internationally and the need to increase the skills and productivity of the front-line workforce. The major purpose of skill standards is to promote education and training investment and ensure that this education and training enables students and workers to meet industry standards that are benchmarked to our major international competitors.

The Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) has been working with industry subcouncils, the Illinois State Board of Education and other partnering agencies to adopt, adapt and/or develop skill standards for high-demand occupations. Skill standards products are being developed for a myriad of industries, occupational clusters and occupations. This document represents the collaborative effort of the Business and Administrative/Information Services Subcouncil, and the Court Reporter/Captioner Standards Development Committee.

These skill standards will serve as a guide to workforce preparation program providers in defining content for their programs and to employers to establish the skills and standards necessary for job acquisition. These standards will also serve as a mechanism for communication among education, business, industry and labor.

We encourage you to review these standards and share your comments. This effort has involved a great many people from business, industry and labor. Comments regarding their usefulness in curriculum and assessment design, as well as your needs for in-service and technical assistance in their implementation are critical to our efforts to move forward and improve the documents.

Questions concerning this document may be directed to:

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We look forward to your comments.

Sincerely,

The Members of the IOSSCC

THE ILLINOIS PERSPECTIVE

The Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) endorses occupational skill standards and credentialing systems for occupations that (a) require basic workplace skills and technical training, (b) provide a large number of jobs with either moderate or high earnings, and (c) provide career advancement opportunities to related occupations with moderate or high earnings. The nine-member Council was established by the Occupational Skill Standards Act (PA 87-1210). The Council, representing business, industry and labor and working with the Illinois State Board of Education in partnership with the Illinois Community College Board, Illinois Board of Higher Education, Illinois Department of Employment Security and Illinois Department of Commerce and Community Affairs, has created a common vision for workforce development in Illinois.

Vision

It is the vision of the IOSSCC to develop a statewide system of industry-defined and recognized skill standards and credentials for all major skilled occupations providing strong employment and earnings opportunities in Illinois. Information related to occupational employment and earning opportunities is determined by the Illinois Occupational Information Coordinating Committee (IOICC) in cooperation with business and industry.

Subcouncils and Standards Development Committees

Under the direction of the Council, and in cooperation with organizations such as the Illinois Chamber of Commerce, the Illinois AFL-CIO, the Illinois Manufacturers' Association, and others, Industry Subcouncils have been formed to review, approve and promote occupational skill standards and credentialing systems. The Industry Subcouncils are Agriculture and Natural Resources; Applied Science and Engineering*; Business and Administrative Information Services; Communications/Information Technology; Construction*; Education and Training Services*; Energy and Utilities*; Financial Services; Health and Social Services; Hospitality; Legal and Protective Services*; Manufacturing; Marketing and Retail Trade; and Transportation, Distribution and Logistics. (*Subcouncils currently being formed.)

The Standards Development Committees, composed of business, labor and education representatives, are experts in the related occupational cluster and work with the product developer to

- Develop or validate occupational skill standards;
- Identify related academic skills;
- Develop or review assessment or credentialing approaches; and
- Recommend endorsement of the standards and credentialing system to the industry subcouncil.

Expected Benefits for Employers, Educators, Students and Workers

Occupational skill standards and credentialing systems are being developed and promoted by the IOSSCC to improve Illinois' competitiveness. Such standards and credentialing systems provide a common language for employers, workers, students and education and training providers to communicate skill requirements and quality expectations for all major industry and occupational areas.

For Employers, skill standards will

- Improve employee recruitment and retention by more clearly identifying skill requirements;
- Encourage improved responsiveness and performance of education and training providers;
- Enlarge the pool of skilled workers; and
- Focus attention on the importance of training investment.

For Education and Training Providers, skill standards will

- Provide information on all major industries and occupations;
- Contribute to program and curriculum development;
- Strengthen relationships between educators and training providers; and
- Improve career planning.

For Students and Workers, skill standards will

- Foster better decision making concerning careers and the training necessary to acquire well-paying jobs;
- Allow more effective communication with employers about what they know and can do; and
- Allow more effective work with employers in career development and skill upgrading.

IOSSCC Requirements for Occupational Skill Standards

Any occupational skill standards and credentialing system seeking IOSSCC endorsement must

- Represent an occupation or occupational cluster that meets the criteria for IOSSCC endorsement;
- Address both content and performance standards for critical work functions and activities for an occupation or occupational area;
- Ensure formal validation and endorsement by a representative group of employers and workers within an industry;
- Provide for review, modification and revalidation by an industry group a minimum of once every five years;
- Award credentials based on assessment approaches that are supported and endorsed by the industry and consistent with nationally recognized guidelines for validity and reliability;
- Provide widespread access and information to the general public in Illinois; and
- Include marketing and promotion by the industry in cooperation with the partner state agencies.

Definitions and Endorsement Criteria

The definitions and endorsement criteria are designed to promote the integration of existing and future industry-recognized standards, as well as the integration of the Illinois academic and occupational skill standards. Because all skill standards must address the critical work functions and activities for an occupation or industry/occupational area, the Council further defined three major components:

- ***Conditions of Performance:*** The information, tools, equipment and other resources provided to a person for a work performance.
- ***Statement of Work:*** A description of the work to be performed by a person.
- ***Performance Criteria:*** The criteria used to determine the required level of performance. These criteria could include product characteristics (e.g., accuracy levels, appearance), process or procedural requirements (e.g., safety, standard professional procedures) and time and resource requirements.

The IOSSCC is currently working with the Illinois State Board of Education and other state agencies to integrate the occupational standards with the Illinois Learning Standards which describe what students should know and be able to do as a result of their education. The Council is also working to integrate workplace skills—problem solving, critical thinking, teamwork, etc.—with both the Learning Standards and the Occupational Skill Standards.

The Illinois Model

Illinois Occupational Skill Standards describe what people should know and be able to do and how well these skills and knowledge will be demonstrated in an occupational setting. They focus on the most critical work performances for an occupation or occupational area. As seen in the following model, Illinois Occupational Skill Standards contain at least these areas:

- Performance Area
- Performance Skill
- Skill Standard
- Performance Elements
- Performance Assessment Criteria

Illinois Occupational Skill Standards also carry a coding at the top of each page identifying the state, fiscal year in which standards were endorsed, subcouncil abbreviation, cluster abbreviation and standard number. For example, the twenty-fifth skill standard in the Court Reporter/Captioner, which has been developed by the Business and Administrative/Information Services Subcouncil, would carry the following coding: IL.00.BAI.CR/C.25.

A model for Illinois Occupational Skill Standards showing the placement of the coding and providing a description of each area within a standard is contained on the following page.

SUMMARY OF WORK TO BE PERFORMED. SUMMARY IS BRIEF AND BEGINS WITH AN ACTION VERB.

IL.FY.SUBCOUNCIL. CLUSTER. STANDARD NO.

PERFORMANCE AREA

SKILL STANDARD

CONDITIONS OF PERFORMANCE

A comprehensive listing of the information, tools, equipment and other resources provided to the person(s) performing the work.

WORK TO BE PERFORMED

An overview of the work to be performed in demonstrating the performance skill standard. This overview should address the major components of the performance. The detailed elements or steps of the performance are listed under "Performance Elements."

PERFORMANCE CRITERIA

The assessment criteria used to evaluate whether the performance meets the standard. Performance criteria specify product/outcome characteristics (e.g., accuracy levels, appearance, results, etc.) and process or procedure requirements (e.g., safety requirements, time requirements, etc.).

PERFORMANCE ELEMENTS

Description of the major elements or steps of the overall performance and any special assessment criteria associated with each element.

PERFORMANCE ASSESSMENT CRITERIA

Listing of required testing, certification and/or licensing.

Product and process used to evaluate the performance of the standard.

PRODUCT

Description of the product resulting from the performance of the skill standard.

PROCESS

Listing of steps from the Performance Elements which must be performed or the required order or performance for meeting the standard.

DEVELOPMENTAL PROCESS

After reviewing the current labor market information, the Business and Administrative/Information Services Subcouncil recommended the development of skill standards for court reporters. The identified career, Court Reporter, meets the criteria established by the Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) for performance skill standard development, education and training requirements, employment opportunities, earnings potential and career opportunities. A product developer knowledgeable about the administrative/information services occupations began the process of performance skill identification. The product developer prepared an outline and framework designed to address the major skills expected of court reporters.

Research information and data for the standards was gathered from the Illinois Court Reporters Association, the National Court Reporters Association, court reporters currently working in the field, and educational institutions that offer a court reporting curriculum.

A standards development committee composed of both freelance and official court reporters was convened. The framework and initial outline of performance skills were presented to the standards development committee for review, adjustment, and/or validation. Work then continued on the development of the skill standards statements and the elements/assessment criteria in accordance with the direction established by the IOSSCC. Educators in the court reporting field met with the standards development committee at their third meeting to review consistency in terminology and the assessment criteria.

A complete set of skill standards statements was provided to the Subcouncil for their review. Comments submitted by members of the Subcouncil have been integrated into the final product. A statement of assumptions accompanies this document to provide context for the standards document.

ASSUMPTIONS FOR COURT REPORTER/CAPTIONER SKILL STANDARDS

Skill standards statements assume:

1. Workplace skills (employability skills) are expected of all individuals. Socialization skills needed for work are related to lifelong career experience and are not solely a part of the initial schooling process. These are not included with this set of statements.
2. Specific policies and procedures of the work-site will be made known to the individual and will be followed.
3. Time elements outlined for the skill standards result from the experience and consideration of the panel of experts who made up the standards development committee.
4. Skills will progress from simple to complex. Once a skill has been successfully performed, it will be incorporated into more complex skills.
5. Skill standards describe the skill only and do not detail the background knowledge or theory related to the particular skill base. Although the skill standards enumerate steps to successful demonstration, rote approaches to the outcomes are not prescribed.
6. Skills are identifiable, measurable standards of practice which individuals may use to demonstrate competency to employers.
7. Skill standards are selected because they meet industry and employer needs and professional standards of practice.
8. The individual will be able to perform other skills that are common to any administrative/information processing job.
9. Skill standards do not replace, supersede, or substitute for procedure manuals.
10. Skill standards do not replace, supersede, or substitute for licensure as a certified court reporter.
11. A court reporter, CART writer, and captioner will follow their Code of Professional Ethics.
12. A court reporter will have been extensively trained on how to convert spoken words into machine shorthand language.
13. A court reporter will have been trained on the computerized steno machine and specialized software.
14. Excellent grammar, spelling, vocabulary and language skills are a pre-requisite to being a successful court reporter.
15. Court reporters must have licensure as a certified court reporter.
16. Court reporters must be resourceful, flexible, and willing to work long hours when needed.
17. For every hour of reporting, a court reporter will spend an additional 2 to 4 hours to complete an accurate transcript.

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TAKE/WRITE VERBATIM RECORD IN MACHINE SHORTHAND.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

- Verbal and/or written information sources (e.g., case caption, attorneys and others present)
- Computerized stenotype machine, manuals, and supplies
- Supplies/materials for marking exhibits
- Exhibits to be marked
- Copy/verbal instruction of oath(s)
- Transcript order forms

WORK TO BE PERFORMED

Take/write verbatim machine shorthand record and administer the oath(s).

Mark exhibits as requested.

PERFORMANCE CRITERIA

The verbatim machine shorthand record is taken/written at a rate of 225 words per minute for a period of 5 minutes with at least 95% accuracy.

The oath(s) is administered and exhibits are marked without error.

The requested shorthand record is read back without error.

PERFORMANCE ELEMENTS

1. Set up equipment.
2. Record case caption, parties present, and attorney representation.
3. Administer the oath(s).
4. Take/write verbatim machine shorthand using computerized stenotype machine.
5. Read back machine shorthand record if requested.
6. Mark exhibits as requested.
7. Receive instructions for transcription and delivery.
8. Complete transcript order form if necessary.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

An accurate verbatim machine shorthand record is taken using a computerized stenotype machine.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

TAKE/WRITE REALTIME VERBATIM RECORD.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

- Verbal and/or written information sources (e.g., case caption, attorneys and others present)
- Realtime reporting computer equipment and supplies
- Appropriate software/manuals
- Computerized stenotype machine, manuals and supplies
- Supplies/materials for marking exhibits
- Exhibits to be marked
- Copy/verbal instruction of oath(s)
- Transcript order forms

WORK TO BE PERFORMED

Take/write realtime verbatim record using stenotype machine connected to computer(s) utilizing realtime software and administer the oath(s).

Mark exhibits as requested.

PERFORMANCE CRITERIA

Using a stenotype machine, the realtime verbatim record is taken/written at a rate of 180-200 words per minute for a period of 5 minutes with at least 96% accuracy.

PERFORMANCE ELEMENTS

1. Set up equipment.
2. Create job dictionary(s).
3. Record case caption, parties present, and attorney representation.
4. Administer the oath(s) if necessary.
5. Take/write realtime verbatim record using the computerized stenotype machine.
6. Mark exhibits as requested.
7. Receive instructions for transcription and delivery, if applicable.
8. Complete transcript order form if necessary.
9. Run spell check and scan for
   a. Format
   b. Punctuation
   c. Capitalization
10. Store/save document.
11. Prepare and provide ASCII disk, if requested.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

An accurate realtime verbatim shorthand record is taken using a computerized stenotype machine connected to a computer(s) utilizing realtime software.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PERFORM CAPTIONING/CART SERVICES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written information
Appropriate captioning/CART (Communication Access Realtime Translation) equipment (e.g., realtime cable, encoder, projector, screen, etc.)
Appropriate captioning/CART supplies (e.g., disks, extension cord, duct tape, etc.)
Appropriate software/manuals
Computerized stenotype machine, manual and supplies
Scripts/printed materials

WORK TO BE PERFORMED

Perform captioning of live or taped events (e.g., TV shows, conferences) using stenotype machine connected to computer(s) utilizing captioning software.

Provide CART using stenotype machine connected to computer(s) with realtime software.

PERFORMANCE CRITERIA

The captioning/CART service is performed at a rate of 200 words per minute for a period of 5 minutes with at least 96% accuracy.

PERFORMANCE ELEMENTS

1. Set up equipment.
2. Create job dictionary(s).
3. Take/write stenotype record in format requested.
4. Run spell check and scan for
   a. Format
   b. Punctuation
   c. Capitalization
5. Prepare final hard copy/disk if requested.
6. Store/save hard copy/disk.
7. Provide unedited ASCII disk if requested.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Captioning/CART services are performed according to job specifications.

PROCESS

All performance elements are critical for performing captioning/CART services and must be performed in sequence.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written information
Verbatim record in stenotype machine
Appropriate software
Computer
Printer
Equipment/software manual(s)
Exhibits
Transcript covers
Reference books and materials (e.g., dictionaries, grammar guides, telephone books)
Electronic sources of reference materials (e.g., CD Rom, Internet)

WORK TO BE PERFORMED

Prepare transcript of machine shorthand record.

PERFORMANCE CRITERIA

For each hour of machine reporting, an additional 2-4 hours will be required to prepare the final transcript.

The transcript of the machine shorthand record will be completed with at least 95% accuracy.

PERFORMANCE ELEMENTS

1. Translate machine shorthand record.
2. Scope/edit transcript.
3. Set up supplemental pages including
   a. Title page
   b. Index
   c. Signature page (if requested)
   d. Certification page
4. Locate and extract information from reference books and electronic sources.
5. Run spell check.
6. Print copy of rough draft.

7. Proofread for
   a. Content
   b. Format
   c. Grammar
   d. Punctuation
   e. Capitalization
   f. Word division
8. Prepare final version of transcript.
9. Print hard copy and/or prepare disk.
10. Prepare and print key word index if requested.
11. Prepare and print condensed transcript if requested.
12. Backup and store/save transcript.
13. Make copies of exhibits if necessary.
14. Bind transcripts and exhibits in a cover.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

The transcript is prepared and completed, including title page(s), index, signature page (if requested), and certification page.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

MAINTAIN APPOINTMENT/JOB CALENDAR.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written information
Appointment/job book
Job information slip
Calendar software program
Computer
Printer
Supplies (e.g., paper, ribbons, toner, pens)
Equipment/software manual(s)

WORK TO BE PERFORMED

Maintain appointment/job book calendar (i.e., schedule, cancel, confirm and reschedule appointments).

PERFORMANCE CRITERIA

The appointment/job calendar is maintained without error.

PERFORMANCE ELEMENTS

1. Fill out appointment/job information slip including, but not limited to
   a. Date
   b. Time
   c. Location
   d. Client's information (e.g., name, phone number, etc.)
2. Write jobs in appointment/job book or input information into computer using calendar software program.
3. Confirm appointments/jobs.
4. Cancel and reschedule appointments/jobs as necessary.
5. Assign job to reporter and provide available appointment/job information.
6. Track reporters' work load information.
   a. Transcript due date
   b. Outstanding pages
7. Print computer-generated calendar if applicable.
8. Store/save electronic calendar on computer disk if applicable.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

The appointment/job calendar is accurately maintained.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PREPARE INVOICE AND DISTRIBUTE TRANSCRIPT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written instructions/information
Computer with modem
Printer
Billing software
Equipment/software manual(s)
Prepared transcript
Transcript information (e.g., distribution list, due dates, distribution instructions)
List of rates
Invoices
Mailing envelopes/labels
Postage meter

WORK TO BE PERFORMED

Prepare and print invoice and distribute with transcript.

PERFORMANCE CRITERIA

The transcript is invoiced, properly packaged and distributed as per instructions.

PERFORMANCE ELEMENTS

1. Review instructions for invoicing and distribution of transcripts.
2. Prepare and print invoice.
3. Prepare and print signature letter (if required).
4. Copy documents for record keeping.
5. Package transcript with invoice and signature letter (if required).
6. Select distribution method.
   a. Mail
      1. Insert document into appropriate envelope for service selected.
      2. Weigh document.
      3. Affix appropriate postage.
   b. Hand delivery
   c. E-mail
7. Arrange for distribution.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

The transcript is prepared, invoiced, and distributed.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

STORE AND RETRIEVE RECORDS, TRANSCRIPT FILES AND STENOGRAPHIC NOTES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written instructions/information
Computer
Printer
Appropriate software
Equipment/software manual(s)
Storage supplies and equipment (e.g., disks, folders, note wrappers, and file cabinets)
Records, transcript files and stenographic notes

WORK TO BE PERFORMED

Store and retrieve records, transcript files, and stenographic notes.

PERFORMANCE CRITERIA

The filing system is set up and records, transcript files, and stenographic notes are stored and retrieved without error.

PERFORMANCE ELEMENTS

1. Review instructions and decide type of filing system to be used (e.g., alphabetic, numeric, subjective).
2. Gather supplies to set up and label records, transcript files and stenographic notes.
3. Label file folders, boxes and filing cabinets.
4. File records, transcript files and stenographic notes appropriately.
5. Retrieve records, transcript files and stenographic notes.
6. Maintain computer files.
   a. Back-up files.
   b. Copy files.
   c. Delete files.
   d. Create new folders.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

A filing system is set up. Records, transcript files, and stenographic notes are stored and retrieved as needed.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

MAINTAIN SUPPLIES, EQUIPMENT AND SOFTWARE.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written instructions/information
Computer
Printer
Access to the Internet
Inventory forms/purchase orders
Appropriate software
Equipment/software manual(s)
Supply catalogs
Telephone
Fax machine

WORK TO BE PERFORMED

Maintain supplies, equipment and software.

PERFORMANCE CRITERIA

Inventory is taken and supplies, equipment, and software are purchased and maintained as per instructions.

PERFORMANCE ELEMENTS

1. Take inventory of supplies, equipment and software.
2. Determine supplies, equipment, and software to be replaced.
3. Complete necessary order forms.
4. Place orders utilizing telephone, fax, Internet or mail.
5. Accept delivery of supplies, equipment and software.
6. Restock and update inventory.
7. Process return of any unordered items.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

An inventory of supplies, equipment and software is taken and replacements are ordered as needed.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PERFORM AND/OR SCHEDULE ROUTINE MAINTENANCE.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written instructions/information
Computer
Printer
Stenotype machine
Equipment manuals
Equipment maintenance supplies (e.g., toner, ink jet cartridge, ribbon, appropriate tools, cleaning supplies, etc.)
Vendor maintenance agreements

WORK TO BE PERFORMED

Perform and/or schedule routine maintenance of equipment.

PERFORMANCE CRITERIA

Routine maintenance of equipment is performed as per manual specifications.

PERFORMANCE ELEMENTS

1. Review equipment maintenance procedures outlined in equipment manual.
2. Contact vendor for equipment maintenance if applicable.
3. Check equipment cables and connections.
4. Obtain supplies and tools necessary to perform routine equipment maintenance.
5. Perform routine equipment maintenance (e.g., change toner, ink jet cartridge, and ribbon, etc.).
6. Test equipment to ensure maintenance was done correctly.
7. Return tools and extra supplies to storage area.
8. Dispose of/recycle used supplies if applicable.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

The equipment is checked and routine maintenance is performed or scheduled.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

MAINTAIN ACCOUNTS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Verbal and/or written instructions/information
Computer
Printer
Appropriate software
Equipment/software manual(s)
Client information
Accounts receivable
Accounts payable
General ledger
Checkbook and bank statements
Payroll data

WORK TO BE PERFORMED

Maintain accounts.

PERFORMANCE CRITERIA

Accounts are maintained without error.

PERFORMANCE ELEMENTS

1. Review all account instructions.
2. Maintain accounts receivable for each client.
   a. Record date of service, name of client, services rendered and amount billed.
   b. Record payments received information (i.e., date received and amount).
   c. Keep running balance of amount owed.
3. Generate and distribute periodic statements for outstanding accounts receivable.
   a. Prepare statement of account.
   b. Mail statement to client once a month.
4. Maintain accounts payable ledger.
   a. Record date of service, vendor's name and amount owed.
   b. Record payment information (i.e., date paid and amount of payment).
   c. Keep running balance of amount owed.

5. Pay expenses to appropriate individuals/companies (e.g., vendors, suppliers, contractors, etc.).
   a. Write check to pay appropriate individuals/companies.
   b. Record check information in checkbook register.
   c. Keep running balance in checkbook.
6. Verify all account entries are accurate.
   a. Check numbers entered in checkbook for accuracy.
   b. Check balances of A/R, A/P, and checkbook for accuracy.
   c. Prepare financial statements, if required.
7. Provide financial records to accountant for tax preparation.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

All accounts are accurately maintained.

PROCESS

The performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

APPENDIX A — GLOSSARY OF TERMS

Academic Skills	Skills (and related knowledge) contained in the subject areas and disciplines addressed in most national and state educational standards, including English, mathematics, science, etc.
Assessment	A process of measuring performance against a set of standards through examinations, practical tests, performance observations and/or the completion of work portfolios.
Content Standard	A specification of what someone should know or be able to do to successfully perform a work activity or demonstrate a skill.
Critical Work Functions	Distinct and economically meaningful sets of work activities critical to a work process or business unit which are performed to achieve a given work objective with work outputs that have definable performance criteria. A critical work function has three major components: • **Conditions of Performance:** The information, tools, equipment and other resources provided to a person for a work performance. • **Work to Be Performed:** A description of the work to be performed. • **Performance Criteria:** The criteria used to determine the required level of performance. These criteria could include product characteristics (e.g., accuracy levels, appearance), process or procedure requirements (e.g., safety, standard professional procedures) and time and resource requirements. The IOSSCC requires that these performance criteria be further specified by more detailed individual performance elements and assessment criteria.
Credentialing	The provision of a certificate or award to an individual indicating the attainment of a designated set of knowledge and skills and/or the demonstration of a set of critical work functions for an industry/occupational area.
Illinois Occupational Skill Standards and Credentialing Council (IOSSCC)	Legislated body representing business and industry which establishes skill standards criteria, endorses final products approved by the industry subcouncil and standards development committee and assists in marketing and dissemination of occupational skill standards.
Industry	Type of economic activity, or product or service produced or provided in a physical location (employer establishment). They are usually defined in terms of the Standard Industrial Classification (SIC) system.

Industry Subcouncil	Representatives from business/industry and education responsible for identifying and prioritizing occupations for which occupational performance skill standards are adapted, adopted or developed. They establish standards development committees and submit developed skill standards to the IOSSCC for endorsement. They design marketing plans and promote endorsed skill standards across the industry.
Knowledge	Understanding the facts, principles, processes, methods and techniques related to a particular subject area, occupation or industry.
Occupation	A group or cluster of jobs, sharing a common set of work functions and tasks, work products/services and/or worker characteristics. Occupations are generally defined in terms of a national classification system including the Standard Occupational Classification (SOC), Occupational Employment Statistics (OES) and the Dictionary of Occupational Titles (DOT).
Occupational Cluster	Grouping of occupations from one or more industries that share common skill requirements.
Occupational Skill Standards	Specifications of content and performance standards for critical work functions or activities and the underlying academic, workplace and occupational knowledge and skills needed for an occupation or an industry/occupational area.
Occupational Skills	Technical skills (and related knowledge) required to perform the work functions and activities within an occupation.
Performance Standard	A specification of the criteria used to judge the successful performance of a work activity or the demonstration of a skill.
Product Developer	Individual contracted to work with the standard development committee, state liaison, industry subcouncil and IOSSCC for the adaptation, adoption or development of skill standards content.
Reliability	The degree of precision or error in an assessment system so repeated measurements yield consistent results.
Skill	A combination of perceptual, motor, manual, intellectual and social abilities used to perform a work activity.
Skill Standard	Statement that specifies the knowledge and competencies required to perform successfully in the workplace.

Standards Development Committee	Incumbent workers, supervisors and human resource persons within the industry who perform the skills for which standards are being developed. Secondary and postsecondary educators are also represented on the committee. They identify and verify occupational skill standards and assessment mechanisms and recommend products to the industry subcouncil for approval.
State Liaison	Individual responsible for communicating information among all parties (e.g., IOSSCC, subcouncil, standard development committee, product developer, project director, etc.) in skill standard development.
Third-Party Assessment	An assessment system in which an industry-designated organization (other than the training provider) administers and controls the assessment process to ensure objectivity and consistency. The training provider could be directly involved in the assessment process under the direction and control of a third-party organization.
Validity	The degree of correspondence between performance in the assessment system and job performance.
Workplace Skills	The generic skills essential to seeking, obtaining, keeping and advancing in any job. These skills are related to the performance of critical work functions across a wide variety of industries and occupations including problem solving, leadership, teamwork, etc.

Margaret Blackshere	AFL-CIO
Judith Hale	Hale Associates
Michael O'Neill	Chicago Building Trades Council
Janet Payne	United Samaritans Medical Center
Gene Rupnik	Hospitality Industry
Jim Schultz	Illinois Retail Merchants Association Walgreen Company
Larry Vaughn	Illinois Chamber of Commerce

APPENDIX C

BUSINESS AND ADMINISTRATIVE/ INFORMATIONAL SERVICES SUBCOUNCIL

Barbara Abrahamson	Field Service Director Illinois Federation of Teachers #801
Keith Allen	Vice President, Human Resources Memorial Health System
Gail Bahar	Vice President Seaway National Bank
Dale T. Chapman	President Lewis & Clark Community College
John P. Coffey	Senior Vice-President State Farm Insurance
Mike English	PMA Financial Network, Inc. Lincoln Trail College, South Campus
Bob Ernest	Vice-President Human Resources Blue Cross & Blue Shield of Illinois
Darlene Furst	Subcouncil Chair President, Furst Staffing Services
Ethel Holladay	Illinois Business Education Association DuQuoin High School
Karen Keasler	Business Division Chairperson Southeastern Illinois College
Jeanette Lipe	President HR Solutions, Inc.
Wanda Liptow	Vice-President & Manager of Human Relations AMCORE Bank N.A., Rockford
Dorothy Ragsdale	Director American Library Association
William Setterstrom	Senior Vice-President, Human Resources The Northern Trust Company
Fred Weber	Director, Human Services Coopers & Lybrand L.L.P.

Tony Zahn	Chicago Region Vice-President Kelly Services
Debra Larson	State Liaison Illinois State Board of Education
Roger Uhe	State Liaison Illinois State Board of Education

APPENDIX D

COURT REPORTER/CAPITIONER SKILL STANDARDS DEVELOPMENT COMMITTEE

Renee Brass, CSR, RPR	Rocca Reporting
Mary Danley, CSR, CM	Fifth Judicial Court
Diane Davis, Ph.D	Professor, ASA – Information Management Systems- Information Systems Technologies Southern Illinois University-Carbondale
Sue Freeman, CSR, RPR	Capitol Reporting Service, Inc.
Lyn Grooms, CSR, RPR, CRR	Freelance Court Reporter
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Jerry Wedeking, CSR, RPR	Freelance Court Reporter
Marilyn Satterwhite	Product Developer Danville Area Community College
Debra Larson	State Liaison Illinois State Board of Education
Roger Uhe	State Liaison Illinois State Board of Education

APPENDIX E

BUSINESS AND ADMINISTRATIVE/ INFORMATIONAL SERVICES SUBCOUNCIL COURT REPORTER/CAPTIONER SKILL STANDARDS RECOGNITION PROPOSAL

I. Occupational Definition and Justification

A. Occupational Definition

Court reporters are experts at gathering information and preserving it in formats that are quickly accessible and readily usable. Today's court reporters are highly trained professionals who continue to educate themselves to meet national and state requirements and must be up-to-date in terms of business, legal and technological environments.

Most reporters apply their skills in a law-related setting such as a court or a deposition, and they have utilized current technology to prepare accurate records of trials, depositions and other legal and business proceedings. Many court reporters are also members of the National Court Reporters Association (NCRA) and subscribe to a code of professional ethics.

Utilizing their skills with a stenotype machine and computers, court reporters can also provide an "instant text" service in live television broadcasts. This service, also used in classrooms and doctors' offices, is called realtime captioning and is primarily for the benefit of people with hearing impairments. Utilizing the same skill required for this service enables a court reporter to provide captioning for cyberconferences.

Court reporters are generally classified into one of three categories:

Official Court Reporter: Official court reporters document all statements made in an official proceeding and present their record as the official transcript. Because there is only one person creating an official transcript, accuracy is vitally important.

Freelance Court Reporter: Although many court reporters record official proceedings in the courtroom, freelance reporters take depositions for attorneys in offices and document proceedings of meetings, conventions and other private activities. Other freelance reporters capture the proceedings in the U.S. Congress, state and local governing bodies and government agencies at all levels.

Captioner/CART (Communication Access Realtime Translation) Reporter: Stenotype machines that link directly to the computer are used for realtime captioning/CART. This service is used in a variety of ways including providing closed captioning for the hearing-impaired on television, in courts, classrooms or meetings. Court reporters who specialize in captioning live television programming are commonly known as Stenocaptioners. They work for television networks or cable stations captioning news, emergency broadcasts, sporting events and other programming.

B. Employment and Earnings Opportunities

1. Education and Training Requirements

Court reporters must complete either a 2- or 4-year post-secondary school program. NCRA approved programs require individuals to capture 225 words per minute. NCRA approved programs also require serving an internship. Illinois requires licensing through the Illinois Department of Professional Regulation.

2. **Employment Opportunities**

Employment opportunities in the court reporting field are plentiful and work in the legal field is keeping pace with increased levels of litigation. It is believed by some that "voice recognition" systems are the wave of the future. Current voice and speech systems have high error rates and systems that can capture natural speech and multiple speakers are many years in the future. Meanwhile, court reporters write accurately at speeds in excess of 200 words per minute.

Nationally, employment of court reporters should continue to grow. The increased number of conventions, conferences, depositions, seminars, and similar meetings in which proceedings are recorded should create demand for freelance and official court reporters as well as captioners/CART reporters. Although many of these events are videotaped, a written transcript must still be created for legal purposes or if the proceedings are to be published. In addition, current federal legislation will require 95% of all new television programming to be captioned by the year 2006. Thus, reporters trained in the area of captioning should see increased opportunities. Trained court reporters may also find increased opportunities as "scopists" or reporters who edit and proofread transcripts for translation errors. Court reporters may also pursue opportunities as legal and medical transcriptionists and rapid data entry operators. Certification by the NCRA will provide an advantage to many skilled reporters.

The trend to provide instantaneous written captions for the deaf and hearing impaired should strengthen demand for stenocaptioners. Likewise, demand should grow for court reporters willing to freelance or take depositions for court reporting service bureaus. However, budget constraints may limit the ability of federal, state, and local courts to expand, even in the face of rising numbers of criminal court cases and civil lawsuits.

Competition for entry-level jobs is increasing as more workers are attracted to the occupation. Earning and maintaining national certification and Illinois licensure through continuing education will improve opportunities for court reporters.

3. **Earnings Opportunities**

Income varies depending on the type of reporting jobs and the experience of the individual reporter. A February 1999 study indicated the average annual income for reporters participating in the study was $61,830. In court reporting, earning potential often is limited only by the amount of time a court reporter is willing to devote to his or her profession. Official court reporters earn a salary and a per-page fee for transcripts. Freelance court reporters are paid per job and receive a per-page fee for transcripts. According to the Department of Information Management at Southern Illinois University-Carbondale, annual salaries range between $38,000 and $60,000 depending on geographic location.

II. **Occupational Standards and Credentials**

A. **Occupational Standards**

B. **Assessment and Credentialing System**

III. Industry Support and Commitment

A. Industry Commitment for Development and Updating

1. The Communication/Information Technology Subcouncil and the Standards Development Committee developed these performance skill standards. The development effort utilized the following steps:
   a. Identification of performance skills
   b. Review of resources
   c. Development of draft performance skills
   d. Convening of Standards Development Committee
   e. Validation and approval of performance skills by Standards Development Committee
   f. Review of skill standards by Standards Development Committee
   g. Review and approval of skill standards by subcouncil and practitioners
   h. Endorsement of skill standards by the IOSSCC.
2. A list of Subcouncil and Standards Development Committee members may be seen in Appendixes C and D, respectively.

B. Industry Commitment for Marketing

The Business and Administrative/Information Services Subcouncil is committed to marketing and obtaining support and endorsement from the business community impacted by these skill standards.

The Subcouncil encourages the availability of occupational skill standards to the public, including students, parents, workers, educators at all levels, employers and industry organization personnel.

A. Developing an Employment Plan	1. Match interests to employment area. 2. Match aptitudes to employment area. 3. Identify short-term work goals. 4. Match attitudes to job area. 5. Match personality type to job area. 6. Match physical capabilities to job area. 7. Identify career information from counseling sources. 8. Demonstrate a drug-free status.
B. Seeking and Applying for Employment Opportunities	1. Locate employment opportunities. 2. Identify job requirements. 3. Locate resources for finding employment. 4. Prepare a resume. 5. Prepare for job interview. 6. Identify conditions for employment. 7. Evaluate job opportunities. 8. Identify steps in applying for a job. 9. Write job application letter. 10. Write interview follow-up letter. 11. Complete job application form. 12. Identify attire for job interview.
C. Accepting Employment	1. Apply for social security number. 2. Complete state and federal tax forms. 3. Accept or reject employment offer. 4. Complete employee's Withholding Allowance Certificate Form W-4.
D. Communicating on the Job	1. Communicate orally with others. 2. Use telephone etiquette. 3. Interpret the use of body language. 4. Prepare written communication. 5. Follow written directions. 6. Ask questions about tasks.
E. Interpreting the Economics of Work	1. Identify the role of business in the economic system. 2. Describe responsibilities of employee. 3. Describe responsibilities of employer or management. 4. Investigate opportunities and options for business ownership. 5. Assess entrepreneurship skills.
F. Maintaining Professionalism	1. Participate in employment orientation. 2. Assess business image, products and/or services. 3. Identify positive behavior. 4. Identify company dress and appearance standards. 5. Participate in meetings in a positive and constructive manner. 6. Identify work-related terminology. 7. Identify how to treat people with respect.

G. Adapting to and Coping with Change	1. Identify elements of job transition. 2. Formulate a transition plan. 3. Identify implementation procedures for a transition plan. 4. Evaluate the transition plan. 5. Exhibit ability to handle stress. 6. Recognize need to change or quit a job. 7. Write a letter of resignation.
H. Solving Problems and Critical Thinking	1. Identify the problem. 2. Clarify purposes and goals. 3. Identify solutions to a problem and their impact. 4. Employ reasoning skills. 5. Evaluate options. 6. Set priorities. 7. Select and implement a solution to a problem. 8. Evaluate results of implemented option. 9. Organize workloads. 10. Assess employer and employee responsibility in solving a problem.
I. Maintaining a Safe and Healthy Work Environment	1. Identify safety and health rules/procedures. 2. Demonstrate the knowledge of equipment in the workplace. 3. Identify conservation and environmental practices and policies. 4. Act during emergencies. 5. Maintain work area. 6. Identify hazardous substances in the workplace.
J. Demonstrating Work Ethics and Behavior	1. Identify established rules, regulations and policies. 2. Practice cost effectiveness. 3. Practice time management. 4. Assume responsibility for decisions and actions. 5. Exhibit pride. 6. Display initiative. 7. Display assertiveness. 8. Demonstrate a willingness to learn. 9. Identify the value of maintaining regular attendance. 10. Apply ethical reasoning.
K. Demonstrating Technological Literacy	1. Demonstrate basic keyboarding skills. 2. Demonstrate basic knowledge of computing. 3. Recognize impact of technological changes on tasks and people.
L. Maintaining Interpersonal Relationships	1. Value individual diversity. 2. Respond to praise or criticism. 3. Provide constructive praise or criticism. 4. Channel and control emotional reactions. 5. Resolve conflicts. 6. Display a positive attitude. 7. Identify and react to sexual intimidation/harassment.
M. Demonstrating Teamwork	1. Identify style of leadership used in teamwork. 2. Match team member skills and group activity. 3. Work with team members. 4. Complete a team task. 5. Evaluate outcomes.

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